

# AA and MA Provisioning Guide

<b>Agency Administrator (AA) – Submitting a User Access Request</b>	Page 2
<b>Agency Administrator (AA) or Master Administrator (MA) – Suspending a User Account</b>	Page 7
<b>Agency Administrator (AA) – Restoring a User Account</b>	Page 10
<b>Agency Administrator (AA) or Master Administrator (MA) – Approving an IPAC Request</b>	Page 13

# AA and MA Provisioning Guide

## Agency Administrator (AA) – Submitting a User Access Request

*This process requires action by two active ITIM users: an AA, who enters the access request and a second AA or an MA, who then approves it. With the ITIM workflow, an MA does not have the ability to initiate a request on behalf of a user.*

1. Access the **ITIM external interface** at <https://reg.fms.treas.gov/itimext/>. Enter your user ID and password, and then click **Log In**.

The screenshot shows the 'fms Enterprise Single Sign On' login page. At the top, there are links for 'Change Password', 'Forgot your Password?', 'Forgot your User ID?', 'Register', and a help icon. Below the header, a 'Log In To:' bar shows the URL 'https://reg-pps.fms.treas.gov/itimext/'. The main content area is titled 'Select an authentication method and enter your credentials'. On the left, there are three options: 'Log In using your FMS:', 'SSO User ID and Password', 'SecurID Token', and 'PKI Certificate'. The 'SSO User ID and Password' option is selected. On the right, there is a form with 'User ID:' (containing 'saa00001') and 'Password:' (containing masked characters). Below the password field are 'Log In' and 'Reset' buttons. There are also links for 'Forgot your User ID?' and 'Forgot your Password?'.

2. When the **Request Management – Your To-Do List** page loads, click **Search** in the blue navigation bar, and then select **Person**.

The screenshot shows the 'Request Management - Your To-Do List' page. The top navigation bar has four tabs: 'Request Management', 'Organization', 'Search', and 'Reports'. The 'Search' tab is highlighted with a red box, and a blue arrow points to it. Below the navigation bar, there is a sub-navigation bar with two options: 'Person' (highlighted with a blue box) and 'Account'. Below this, there is a table with the following columns: 'Locked', 'Activity', 'Time Due', 'Requestee', and 'Subject'.

3. When the **Search Person** page loads, select the desired search criteria from the dropdown menu in the **Where** field (note that the **Select** field will default to **External**, and may be modified as needed).

The screenshot shows the 'Search Person' page. The top navigation bar has four tabs: 'Request Management', 'Organization', 'Search', and 'Reports'. The 'Search' tab is highlighted. Below the navigation bar, there is a form with the title 'Search Person'. The form has two main sections: 'Select' and 'Where'. The 'Select' section has a dropdown menu with 'External' selected. The 'Where' section has a dropdown menu with 'Full Name' selected. There is also a 'Contains' dropdown menu. A blue arrow points to the 'Where' dropdown menu. Below the form, there is a 'Search' button.

# AA and MA Provisioning Guide

4. In the blank open text field, enter the search term for the individual you wish to locate (note that the field in the center column will default to **Contains**, and may be modified as needed to select another search operator).

Request Management Organization Search Reports

Search Person

Select	External		
Where	Enterprise ID	Contains	buser001

Search

5. Click **Search**, followed by the **Select** link next to the appropriate entry in the search results that appear.

Request Management Organization Search Reports

Search Person

Select	External		
Where	Enterprise ID	Contains	buser001

Search

Select	Name	E-Mail	Status	Organization
Select	Bruce User	carsuser2@yahoo.com	Active	

6. When the **Manage User: User Name** page opens, click the **Manage Accounts** link.

Request Management Organization

Manage User: Bruce User

- [Manage Personal Info](#)
- [Manage Accounts](#)
- [Manage Passwords](#)

7. When the **Manage Accounts: User Name** page opens, click **New**.

Request Management Organization Search Reports

Manage Accounts: Bruce User

Select	User ID	Service	Status
--------	---------	---------	--------

New Suspend Restore De-Provision Cancel

# AA and MA Provisioning Guide

8. When the **Create Account for: User Name** page opens, select **IPAC**, and then click **Submit**.

Request Management Organization

Create Account for: Bruce User

Choose Account Type

☒ IPAC

Submit Cancel

9. When the **Edit Account: IPAC** page appears, select the **Click to Modify** link in the **Modules, Roles, and ALCs** field.

Request Management Organization Search Reports

Edit Account: IPAC

User ID *	buser001
Modules, Roles, and ALCs	<a href="#">Click to Modify</a>
Suspended Due to Inactivity?	<input type="checkbox"/>

☒ Schedule for Now

☐ Schedule for Later 3/4/2014 Time: 00:00

Submit Cancel

10. When the **IPAC Access Permissions** page opens, navigate through each of the three dropdown menus from left to right to select the appropriate options in the **Module**, **Role**, and **ALC** fields.

## IPAC Access Permissions

Please provide the permissions for this user's IPAC access.

- The *ALC 0* flag will override any value chosen in the *ALC* dropdown box.
- The *RITS Payroll* text box value will override any value chosen in the *ALC* dropdown box.

Module	Role	ALC	ALC 0
IPACB	IPAC User	00001003	<input type="checkbox"/>

Add OK Cancel

# AA and MA Provisioning Guide

11. After all three fields are populated with your selections, click **Add**. This will add the Module/Role/ALC combination to the **Current Permissions** section.

**NOTE:** Only one ALC may be selected per row. To add additional modules/roles for the same or other ALCs, move through steps 10 & 11 as many times as needed. Upon entering each module/role/ALC combination, verify that it appears in its own row under **Current Permissions**.

## IPAC Access Permissions

Please provide the permissions for this user's IPAC access.

- The ALC 0 flag will override any value chosen in the ALC dropdown box.
- The RITS Payroll text box value will override any value chosen in the ALC dropdown box.

Module	Role	ALC	ALC 0
IPACB	IPAC User	00001003	<input type="checkbox"/>

**Add** OK Cancel

## Current Permissions

Module	Role	ALC	Remove
--------	------	-----	--------

12. When all necessary module/role/ALC combinations appear in the **Current Permissions** section, click **OK**.

## IPAC Access Permissions

Please provide the permissions for this user's IPAC access.

- The ALC 0 flag will override any value chosen in the ALC dropdown box.
- The RITS Payroll text box value will override any value chosen in the ALC dropdown box.

Module	Role	ALC	ALC 0
			<input type="checkbox"/>

Add **OK** Cancel

## Current Permissions

Module	Role	ALC	Remove
IPACB	IPAC User	00001003	<input type="button" value="Remove"/>



# AA and MA Provisioning Guide

13. When the **Edit Account: IPAC** page reappears, click **Submit** to proceed with the default selection of **Schedule for Now**. If the user's access should go into effect at a future point in time, click the radio button to select **Schedule for Later**, enter the desired date and time for access to be provisioned, and then click **Submit**.

Request Management Organization Search Reports

Edit Account: IPAC

Main

User ID \* buser001

Modules, Roles, and ALCs [Click to Modify]

Suspended Due to Inactivity? ☐

☒ Schedule for Now

☐ Schedule for Later 3/4/2014 Time: 00:00

Submit Cancel

14. When the **Request Management – Your Pending Requests** page opens, verify that the submitted request is listed with a status of “In Process.” The request has now been sent for approval to any other AAs and the MA for the ALCs requested.

Request Management Organization Search Reports

Request Management - Your Pending Requests

Select	View Details	Request ID	Time Submitted	Process Type	Requestee	Subject	Status
<input type="checkbox"/>	<a href="#">Details</a>	1007871783680820335	Mar 04, 2014 11:45 AM EST	Create Account	Bruce User	buser001	In Process

Abort Reset

**IMPORTANT NOTE:** Access and account restore requests are reviewed and approved/rejected on a case-by-case basis according to the ALC selected. Each request is sent to the Agency Administrator(s) and Master Administrator for that ALC. If access requests for multiple ALCs are submitted, a separate access request will be sent to the appropriate AA(s)/MA for each ALC, even if the AA(s)/MA is the same for all ALCs to which access was requested.


Because access to multiple ALCs may be requested within a single submission, it is possible that a specific ALC access request within the submission may have been rejected by the AA(s)/MA for that ALC, even if the submission appears on the **View My Requests** page with a status of “Success.” If the user is unable to access IPAC with any module/role/ALC combination(s) requested, it will be necessary to resubmit an access request for the missing module/role/ALC combination(s).

**For guidance on access request approvals, please refer to the “Agency Administrator (AA) – Approving an Access or Account Restore Request” or “Master Administrator (MA) – Approving an Access or Account Restore Request” sections of this guide.**

# AA and MA Provisioning Guide

## Agency Administrator (AA) /Master Administrator (MA) – Suspending a User Account

1. Access the **ITIM External Interface** page at <https://reg.fms.treas.gov/itimext>. Enter your user ID and password, and then click **Log In**.



fms  
Enterprise Single Sign On

Log In To: <https://reg-pps.fms.treas.gov/itimext>

Change Password | Forgot your Password? | Forgot your User Id? | Register | ?

Select an authentication method and enter your credentials

Log In using your FMS:

SSO User ID and Password ▶

SecurID Token

PKI Certificate

To log in using your FMS Single Sign On User ID and Password, please enter your User ID and Password.

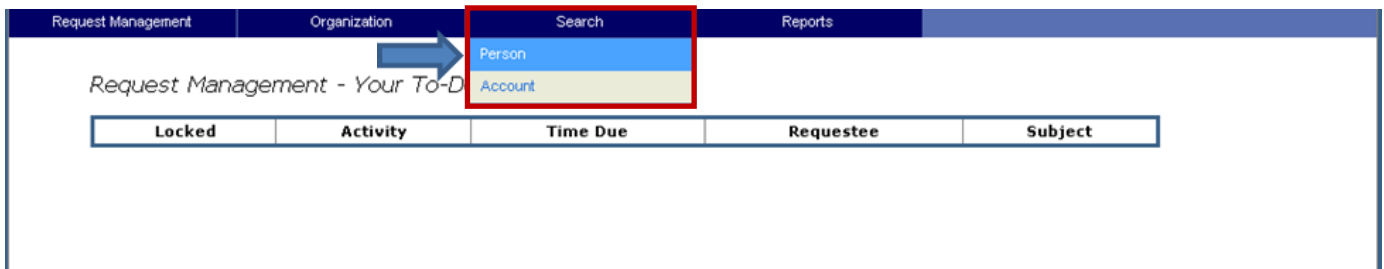
User ID:

Password:

**Log In** Reset

[Forgot your User Id?](#)  
[Forgot your Password?](#)

2. When the **Request Management – Your To-Do List** page loads, click **Search** in the blue navigation bar, and then select **Person**.



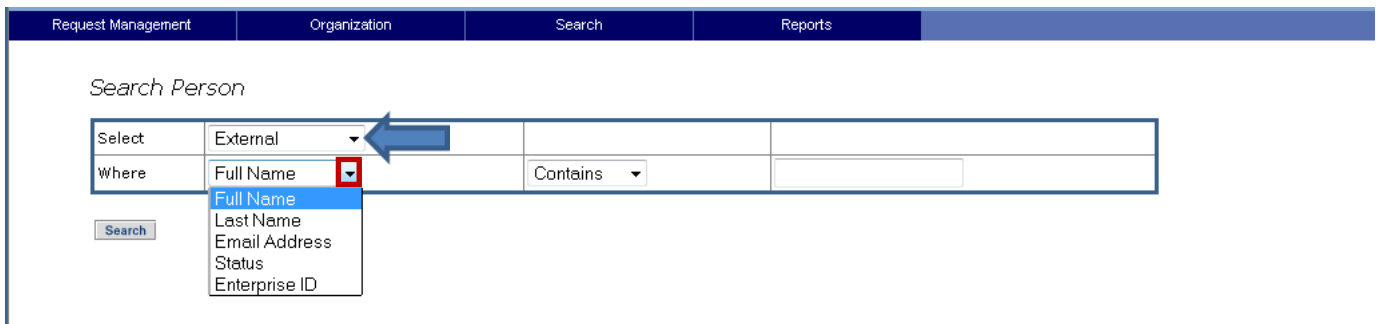
Request Management | Organization | **Search** | Reports

Request Management - Your To-Do List

Person  
Account

Locked	Activity	Time Due	Requestee	Subject
--------	----------	----------	-----------	---------

3. When the **Search Person** page loads, select the desired search criteria from the dropdown menu in the **Where** field (note that the **Select** field will default to **External**, and may be modified as needed).



Request Management | Organization | Search | Reports

Search Person

Select: External

Where: **Full Name**

Contains

Search

Full Name  
Last Name  
Email Address  
Status  
Enterprise ID

# AA and MA Provisioning Guide

4. In the blank open text field, enter the search term for the individual you wish to locate (note that the field in the center column will default to **Contains**, and may be modified as needed to select another search operator).

Search Person

Select	External		
Where	Enterprise ID	Contains	buser001

Search

5. Click **Search**, followed by the **Select** link next to the appropriate entry in the search results that appear.

Search Person

Select	External		
Where	Enterprise ID	Contains	buser001

Search

	Name	E-Mail	Status	Organization
Select	Bruce User	carsuser2@yahoo.com	Active	

6. When the **Manage User: User Name** page opens, click the **Manage Accounts** link.

Manage User: Bruce User

- [Manage Personal Info](#)
- [Manage Accounts](#)
- [Manage Passwords](#)

7. When the **Manage Accounts: User Name** page opens, click the checkbox that corresponds with the user account you wish to suspend, and then click **Suspend**.

Manage Accounts: Bruce User

Select	User ID	Service	Status
<input checked="" type="checkbox"/>	buser001	IPAC	Active

New Suspend Restore De-Provision Cancel

# AA and MA Provisioning Guide

8. Click **Submit** to proceed with the default selection of **Schedule for Now**, which immediately suspends the selected account. If the suspension should go into effect at a future point in time, click the radio button to select **Schedule for Later**, enter the desired date and time for access to be suspended, and then click **Submit**.

Request Management Organization Search Reports

**Manage Accounts: Bruce User**

☒ Schedule for Now  
☐ Schedule for Later 3/4/2014 Time: 00:00

Confirm suspend of the following accounts:

User ID	Service	Status
buser001	IPAC	Active

**Submit** Cancel

9. When the **Request Management – Your Pending Requests** page opens, click **Request Management** in the blue navigation bar, and then select **View Completed Requests**.

Request Management Organization Search Reports

**Request Management - Your Pending Requests**

To-Do List  
View Pending Requests  
View Completed Requests

Request ID	Time Submitted	Process Type	Requestee	Subject	Status
------------	----------------	--------------	-----------	---------	--------

10. When the **Request Management – Your Completed Requests** page opens, verify that the submitted request is listed with a status of “Succeeded.”

Request Management Organization Search Reports

**Request Management - Your Completed Requests**

Find requests during this time period: Completed This Week Refresh

Details	Request ID	Time Completed	Process Type	Requestee	Subject	Status
<a href="#">Details</a>	1007871783680820335	Mar 04, 2014 11:48 AM EST	Suspend Account	Bruce User	buser001	Succeeded

11. Follow steps 2-6 above to view the users account shows as inactive.

Request Management Organization Search Reports

**Manage Accounts: Bruce User**

Select	User ID	Service	Status
<input checked="" type="checkbox"/>	buser001	IPAC	Inactive

New Suspend Restore De-Provision Cancel

# AA and MA Provisioning Guide

## Agency Administrator (AA) – Restoring a User Account

*This process requires action by two active ITIM users: an AA, who enters the account restore request, and a second AA or an MA, who then approves it. With the ITIM workflow, an MA does not have the ability to initiate a Create or Restore request on behalf of a user.*

1. Access the **ITIM External Interface** page at <https://reg.fms.treas.gov/itimext>. Enter your user ID and password, and then click **Log In**.

The screenshot shows the 'fms Enterprise Single Sign On' login page. At the top, there are links for 'Change Password', 'Forgot your Password?', 'Forgot your User Id?', 'Register', and a help icon. Below the header, the login URL is displayed: 'Log In To: https://ireg-pps.fms.treas.gov/itimext'. The main content area is titled 'Select an authentication method and enter your credentials'. On the left, there are three options: 'Log In using your FMS:', 'SSO User ID and Password', 'SecurID Token', and 'PKI Certificate'. The 'SSO User ID and Password' option is selected. On the right, there is a text prompt: 'To log in using your FMS Single Sign On User ID and Password, please enter your User ID and Password.' Below this, there are input fields for 'User ID:' (containing 'saa00001') and 'Password:' (containing '\*\*\*\*\*'). There are 'Log In' and 'Reset' buttons. Below the buttons are two links: 'Forgot your User Id?' and 'Forgot your Password?'.

2. When the **Request Management – Your To-Do List** page loads, click **Search** in the blue navigation bar, and then select **Person**.

The screenshot shows the 'Request Management - Your To-Do List' page. At the top, there is a blue navigation bar with tabs: 'Request Management', 'Organization', 'Search', and 'Reports'. The 'Search' tab is selected. Below the navigation bar, there is a dropdown menu with 'Person' and 'Account' options. The 'Person' option is selected. Below the dropdown menu, there is a table with the following columns: 'Locked', 'Activity', 'Time Due', 'Requestee', and 'Subject'.


3. When the **Search Person** page loads, select the desired search criteria from the dropdown menu in the **Where** field (note that the **Select** field will default to **External**, and may be modified as needed).

The screenshot shows the 'Search Person' page. At the top, there is a blue navigation bar with tabs: 'Request Management', 'Organization', 'Search', and 'Reports'. The 'Search' tab is selected. Below the navigation bar, there is a form with the following fields: 'Select' (with a dropdown menu showing 'External'), 'Where' (with a dropdown menu showing 'Full Name'), 'Contains' (with a dropdown menu showing 'Contains'), and a 'Search' button. The 'Where' dropdown menu is open, showing options: 'Full Name', 'Last Name', 'Email Address', 'Status', and 'Enterprise ID'.

# AA and MA Provisioning Guide

4. In the blank open text field, enter the search term for the individual you wish to locate (note that the field in the center column will default to **Contains**, and may be modified as needed to select another search operator).

Request Management	Organization	Search	Reports
<i>Search Person</i>			
Select	External		
Where	Enterprise ID	Contains	buser001
<input type="button" value="Search"/>			



5. Click **Search**, followed by the **Select** link next to the appropriate entry in the search results that appear.

Request Management	Organization	Search	Reports	
<i>Search Person</i>				
Select	External			
Where	Enterprise ID	Contains	buser001	
<input type="button" value="Search"/>				
<b>Select</b>	Name	E-Mail	Status	Organization
	Bruce User	carsuser2@yahoo.com	Active	

6. When the **Manage User: User Name** page opens, click the **Manage Accounts** link.

Request Management	Organization
<i>Manage User: Bruce User</i>	
<ul style="list-style-type: none"><li>• <a href="#">Manage Personal Info</a></li><li>• <b><a href="#">Manage Accounts</a></b></li><li>• <a href="#">Manage Passwords</a></li></ul>	

7. When the **Manage Accounts: User Name** page opens, click the checkbox that corresponds with the user account you wish to restore, and then click **Restore**.

Request Management	Organization	Search	Reports
<i>Manage Accounts: Bruce User</i>			
Select	User ID	Service	Status
<input checked="" type="checkbox"/>	buser001	IPAC	Inactive
<input type="button" value="New"/> <input type="button" value="Suspend"/> <b><input type="button" value="Restore"/></b> <input type="button" value="De-Provision"/> <input type="button" value="Cancel"/>			

# AA and MA Provisioning Guide

8. Click **Submit** to proceed with the default selection of **Schedule for Now**, which will immediately send the account restore request to the second AA/MA for approval. If the account should be restored at a future point in time, click the radio button to select **Schedule for Later**, enter the desired date and time for access to be restored, and then click **Submit**.

Request Management	Organization	Search	Reports
--------------------	--------------	--------	---------

**Manage Accounts: Bruce User**

☒ Schedule for Now  
☐ Schedule for Later 3/4/2014 Time: 00:00 ▼

Confirm restore of the following accounts:

User ID	Service	Status
buser001	IPAC	Inactive

**Submit** **Cancel**

9. When the **Request Management – Your Pending Requests** page opens, verify that the submitted request is listed with a status of “In Process.” The request has now been sent for approval to any other AAs and the MA for the ALCs requested.

Request Management	Organization	Search	Reports
--------------------	--------------	--------	---------

**Request Management - Your Pending Requests**

Select	View Details	Request ID	Time Submitted	Process Type	Requestee	Subject	Status
<input type="checkbox"/>	<a href="#">Details</a>	1037054631840325730	Mar 04, 2014 01:39 PM EST	Restore Account	Bruce User	buser001	In Process

**Abort** **Reset**

**For guidance on account restore request approvals, please refer to the “Agency Administrator (AA) – Approving an Access or Account Restore Request” or “Master Administrator (MA) – Approving an Access or Account Restore Request” sections of this guide.**

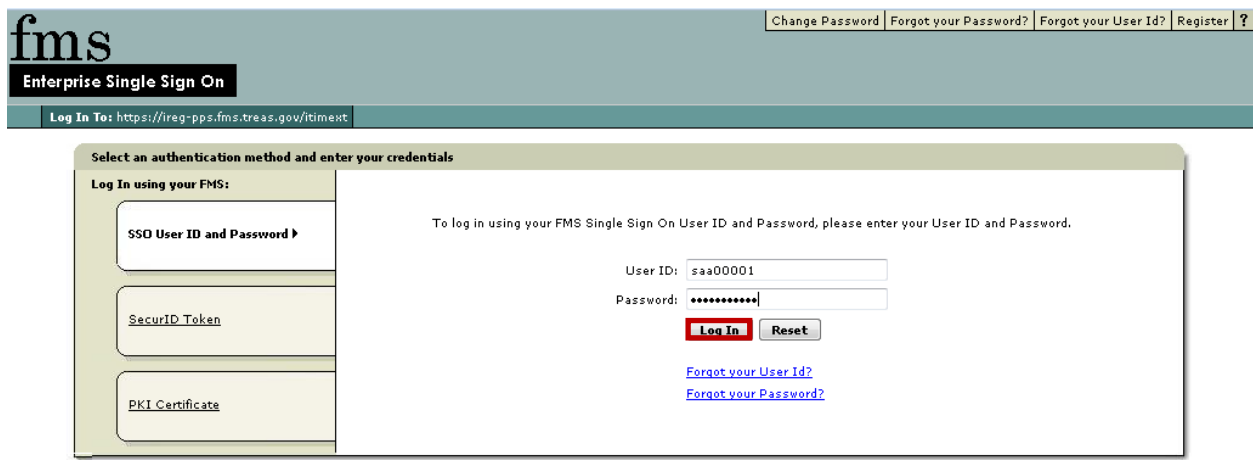
# AA and MA Provisioning Guide

## Agency Administrator (AA)/Master Administrator (MA) – Approving an IPAC Request

*All approvals for regular IPAC user modules and roles are routed for approval to both the Agency Administrator(s) and Master Administrators for an ALC. Either the AA or MA must take action on the request within three days of submission or the request will time out and the request will need to be resubmitted. Once the request is approved/rejected, it will disappear from the other approvers To-Do list.*

*Requests for the Enroll module and the Agency Administrator role will only be routed to the Master Administrator for that ALC for approval. The same three day approval is required for the Agency Administrator role.*

1. Access the ITIM External Interface website at <https://reg.fms.treas.gov/itimext>. Enter your user ID and password, and then click **Log In**.



2. When the **Request Management – Your To-Do List** page loads, click the **AA MA Approval** link in the Activity column.

If you are an AA or MA for multiple ALCs, you will receive a separate request for approval for each module/role/ALC combination the user requested. Users will only be given access to the requests you approve. They will not be able to access IPAC with the module/role/ALC combinations that you reject or do not take action on.

***All approvals must be completed within three days.*** If no action is taken on a request within 3 days, it will time out and the user will not get access to the module/role/ALC combinations requested.

Request Management   Organization   Search   Reports

Request Management - Your To-Do List

Locked	Activity	Time Due	Requestee	Subject
	AA MA Approval	Mar 07, 2014 09:51 AM EST	Bruce User	buser001

# AA and MA Provisioning Guide

- When the **Approve/Reject the Request** page opens, click **View Request Data** to access additional request details, and then click **Back** to return to the **Approve/Reject** screen.

Request Management	Organization	Search	Reports
<b>Approve / Reject the Request</b>			
Description	IPACB IPAC User 00001003 access request for Bruce User's account buser001 on IPAC requires your approval.		
Request ID	978348766731373089		
Requestor	Bruce User		
Requestee	Bruce User		
Subject	buser001		
Time Submitted	Mar 04, 2014 09:51 AM EST		
Time Due	Mar 07, 2014 09:51 AM EST		
	<a href="#">View Request Data</a>		
Explanation	User ID *	buser001	
	Admin Role		
	Modules, Roles, and ALCs	IPACB IPAC User 00001003	
	Suspended Due to Inactivity?	<input type="checkbox"/>	
<a href="#">Approve</a> <a href="#">Reject</a> <a href="#">Cancel</a>			
<a href="#">Back</a>			

- Click **Approve or Reject** based on whether the user should have access to this module/role/ALC. You have the ability to provide a reason for rejecting the request in the Explanation field

Request Management	Organization	Search	Reports
<b>Approve / Reject the Request</b>			
Description	IPACB IPAC User 00001003 access request for Bruce User's account buser001 on IPAC requires your approval.		
Request ID	978348766731373089		
Requestor	Bruce User		
Requestee	Bruce User		
Subject	buser001		
Time Submitted	Mar 04, 2014 09:51 AM EST		
Time Due	Mar 07, 2014 09:51 AM EST		
	<a href="#">View Request Data</a>		
Explanation			
<a href="#">Approve</a> <a href="#">Reject</a> <a href="#">Cancel</a>			

- On the **Request Management – Your To-Do List** page, verify that the approved request no longer appears and whether there are other requests that need action.

Request Management

Organization

Search

Reports

Request Management - Your To-Do List

Locked	Activity	Time Due	Requestee	Subject
--------	----------	----------	-----------	---------